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Germany

ATO ACTIVITIES reports

Agricultural Export Opportunities Report, May 2000 2000

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Report Highlights:

Summary of important information available to promote US Food products in Germany. German Trade Show calendar for 2nd half of 2000 and 2001. Highlights of new and updated marketing reports available.

Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Hamburg [GM2], GM

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CONTENTS OF REPORT

- I. Key Market Information
 - Food/Beverage Market Developments
 - Reports of Interest
 - Web Page Sites
- II. Upcoming Promotional Activities/Events
 - German Trade Shows
 - Other Promotions/Activities

I. KEY MARKET INFORMATION**Food/Beverage Market Developments:****German Imports of U.S. Food, Fish and Wood Products Decline 20% in 1999**

According to German trade figures, German imports of U.S. agricultural products were valued at \$1.84 billion in 1999, down 20% from the \$2.29 billion imported in 1998. Imports from all sources were also down 12% in 1999. Many factors contributed to this decline including the strong U.S. dollar, lackluster German economy, strong competition from domestic and other foreign suppliers and continued concern over GMO's.

Products showing large declines in 1999 included: corn gluten, soybeans, veneers & panels, wood pulp, almonds and pet foods. Products showing strong increase in 1999 included: rice, wine, honey, bakery products and candies. Some of the leading products imported in 1999 (with 1998 figures in parentheses) were: Soybeans \$323M (\$477M); Raw Tobacco \$255M (\$218M); Wood Pulp \$204M (\$277M); Almonds \$144M (\$175M); Veneers and Panels \$116M (\$170M); Ethyl Alcohol & Spirits \$88M (\$77M); Fruits \$60M (\$88M); Corn Gluten \$56M (\$91M); Wine \$48M (\$39); Sunflower-seed \$40M (\$41M); Fish & Fish Products \$39M (\$47M); Rice \$38M (\$32M); Pet Foods \$35M

(\$41M).

Reports of Interest

FAS German Market/Product Briefs and other Reports.

FAS/Germany (the ATO-Hamburg and the FAS office in Berlin) have produced a number of Market/Product Briefs and other reports on various topics concerning the German market for agricultural and food products. The following is a list of some of these reports that may be of interest to U.S. exporters:

- Asparagus Annual Report (5/2000, GM0015)
- Road Map to the German Market (4/2000, GM0304)
- Germany's HRI Food Service Sector Report (3/2000, GM0303)
- Germany's Retail Food Sector Report (3/2000, GM0302)
- Fresh Deciduous Fruit Semi-Annual (12/99, GM0001)
- Citrus Annual (12/99, GM9070)
- Wine Marketing Annual (12/99, GM9069)
- Organic Market Report (12/99, GM9071)
- Biotechnology (12/99, GM9068)
- German Food and Veterinary Agencies (11/99, GM9066)
- Processed Sweet Corn Annual Report (10/99, GM9060)
- Poultry Annual Report (10/99, GM9050)
- Honey Annual Report (10/99, GM9053)
- Seafood Annual Report (9/99, GM9055)
- Fresh Deciduous Fruit Annual Report (9/99, GM9054)
- Food and Agricultural Import Regulations and Standards 1999 Update (8/99, GM9048)
- German Customs Offices (6/99, GM9026)
- Variety Meats Report (9/99, GM9023)
- Rice Report (4/99, GM9025)
- Wine Market Brief (5/99, GM9003)
- German Food Law Market Brief (4/98, GM8023)

Copies of these reports can be found on the FAS homepage at: <http://www.fas.usda.gov>.

FAS Market Study on Germany's Food Service Sector. New Report!! (3/2000, GM0303)

The German foodservice sector is currently undergoing a period of major structural change, partly as a result of changing consumer behavior, with increasing demand for ethnic foods, local specialties, variety, health foods, price and prestige. Over the next ten years, consumer expenditure on foodservice in Germany is expected to grow at 2.75% per annum (compared to only 1.25% for retail).

Road map to the German Market. New Report!! (4/2000, GM0304)

Germany represents the biggest market in Europe for consumer-oriented foods and beverages. Changing lifestyles have fueled a sharp rise in the consumption of consumer-ready foods in Germany. Competition in the agriculture, food and beverage markets is fierce, from both domestic and imported

products. German imports of these products are large, mostly from neighboring EU member countries. However, U.S.-style snack and processed foods are viewed favorably in Germany, particularly by the younger generation and German imports of U.S. products have tripled since the early 1990s.

Germany's Retail Food Sector Report. Updated Report !! (3/2000, GM0302)

Germany's Retail Food Sector Germany, with its 82 million people and the largest economy in Europe, is the leading European market for foods and beverages. Germany's retailing sector can be characterized as very competitive, highly complex and intertwined, and currently is undergoing considerable consolidation. Products from within the country and from other European Union countries dominate the shelves of retail outlets. Despite the challenges, the German market offers excellent opportunities for foods and beverages from throughout the world, including from the United States.

Organic Market Report. Updated Report !! (12/99, GM9071)

Organic Products - Because I am worth it. Germany is one of the largest producers and also one of the biggest market for organic food products in the world. Even though demand has also increased, farmers do not always find customers willing to pay 'premium prices' for their organic products. Therefore, not all products produced on organic farms are being marketed as organic. Total organic food sales are roughly estimated at \$2.0 billion in 1998. Many industry experts indicate that the demand for organic products will continue to grow at near double digit rates over the next couple of years.

Web Page Sites:

The following are some Internet Home Pages of potential interest to U.S. exporters:

www.fas.usda.gov	FAS/Washington
www.usembassy.de/atohamburg	ATO-Hamburg
www.american-foods.org	European Importers of U.S. Foods & Beverages
www.auma.de	AUMA - details on German exhibitions & trade shows

Check them out!

II. UPCOMING PROMOTIONAL ACTIVITIES/EVENTS

The following section presents trade shows and other promotional activities and events for food, beverages and other agricultural and related industries taking place in Germany. The Agricultural Trade Office (ATO) in Hamburg will update the details concerning these activities/events, and add new ones, as information becomes available. The ATO-Hamburg would appreciate receiving details on other promotional opportunities for U.S. food and beverage products that will be taking place in Germany.

Note: The promotional events listed are provided for informational purposes only. No endorsement should be implied unless specifically stated. Terms and conditions of participation are the responsibility of the activity organizer. Please contact the organizer directly for further information.

German Trade Shows (major food and agriculture):

Participating or simply attending a trade show can be a very cost-effective way to test the market, introduce a product or to expand sales. Germany offers a wide variety of trade show venues for food and beverage products. The following list provides details on major trade shows for food, beverages and other agricultural and related industries taking place in Germany.

2000 Trade Shows

Catering & GV World 2000

Frankfurt, Germany, June 6-8, 2000 (Interval: yearly)

Show Organizer: GAPP Frankfurt, Tel: (49-69) 2400- 020; Fax: (49-69) 2400-0219;

<http://www.catering-world.com>

Target Market: Germany/Europe

Description of Show: International trade show for catering and HRI equipment, as well as foods & beverages for the HRI trade.

InterCool 2000

Duesseldorf, Germany, September 24-27, 2000 (Interval: 2 years)

Show Organizer: Messe Duesseldorf, Tel: (49-211) 4560-5701; Fax: (49-211) 4560-87571;

<http://www.messe-duesseldorf.de>

Target Market: Germany/Europe

Trade show for frozen foods, ice cream, and refrigeration technology. Held in conjunction with InterMeat and InterMopro (dairy products).

IBA 2000 (International Bakers Show)

Munich, Germany, September 29 - October 5, 2000 (Interval: 3 years)

Show Organizer: Federal German Bakery Trade Association, Tel: (49-2224) 7704-26; Fax: (49-2224) 7704-40; <http://www.baeckerhandwerk.de>

Target Market: Germany/World

International show for bakery and confectionery trade.

ANUGA Spezial 2000

Cologne, Germany, October 12-15, 2000 (Interval: yearly)

Show organizer: Cologne International Trade Fairs, New York, Tel: (212) 974-8837; Fax: (212) 974-8838; http://www.koelnmesse.de/anuga_spezial

Target Market: Germany/Europe

Description of Show: The Forum for Regional Specialties. In odd years, ANUGA Spezial will become a separate product sector of the international ANUGA trade show.

IMEGA 2000

Munich, Germany, October 15-18, 2000 (Interval: 2 years)

Show Organizer: Messe Muenchen GmbH, Tel. (49-89) 949-20230; Fax: (49-89) 949-20239;

<http://www.imega.de>

Target Market: Germany/Europe

Description of Show: International trade show for the restaurant, hotel and catering industries.

Health Ingredients-Europe 2000

Frankfurt, Germany, November 20-22, 2000 (Interval: 2 years)

U.S. Pavilion Organizer: T&G Food Ingredient Services Inc. (Miller Freeman's N. American Agent),
Tel: (847) 635-9960; Fax: (847) 635-6801.

Target Market: Europe/International

This is a new trade show, which will alternate with the current Food Ingredients-Europe. The two shows will alternate yearly, with Health Ingredients taking place in the even years and Food Ingredients in the odd. Health Ingredients-Europe will feature ingredients for the development of health, functional and organic foods.

2001 Trade Shows**Fruit Logistica 2001**

Berlin, Germany, January 18-20, 2001 (Interval: yearly)

U.S. Pavilion Organizer: B-FOR International, Messe Berlin's U.S. office, Tel: (540) 373-9935; Fax: (540) 372-1414; [Http://www.exhibitpro.com](http://www.exhibitpro.com)

Target Market: Germany/EU/Central & Eastern Europe

This is a USDA endorsed show and contains a U.S. Pavilion. Good venue for exhibiting fresh fruits & vegetables, dried fruits & nuts, and related products. The trade-only show is held in conjunction with the International Green Week (see below).

International Green Week 2001

Berlin, Germany, January 19-28, 2001 (Interval: yearly)

Show Organizer: Messe Berlin GmbH, Tel: (49-30) 3038-2026; Fax (49-30) 3038-2019;
<http://www.gruenewoche.de>

Large international consumer show for food, beverages, agriculture and horticulture.

Target Market: Germany/Europe

Note: The show usually contains a U.S. Pavilion.

ISM 2001 (International Sweets and Biscuit Show)

Cologne, Germany, January 28 - Feb. 1, 2001 (Interval: yearly)

U.S. Pavilion Organizers: Cologne International Trade Fairs, New York, Tel: (212) 974-8837; Fax: (212) 974-8838; <http://www.koelnmesse.de/ISM>. and National Confectioners Association, Tel: (703) 790-5750; Fax: (703) 790-5752.

Target Market: Europe/International

World's largest show for snacks and confectionery products. NCA organizes the U.S. Pavilion at this "world-class" show. ATO-Hamburg will staff an information stand in the U.S. Pavilion.

IPM 2001 (International Plant Show)

Essen, Germany, February 1-4, 2001 (Interval: yearly)

U.S. Pavilion Organizer: Messe Essen's U.S. office, Tel: (212) 356-0406, Fax: (212) 356-0404; and SUSTA, Tel: (504) 568-5986, Fax: (504) 568-6010

Target Market: Germany/Europe

International/European trade fair for the horticultural and nursery industry. The Southern Nurserymen and SUSTA participate jointly in the U.S. Pavilion at the show. This is a USDA-endorsed show.

Bio Fach 2001

Nuremberg, Germany, February 15-18, 2001 (Interval: yearly)

U.S. Pavilion Organizer: NuernbergMesse's U.S. representative, Tel: (978) 371-2203; Fax: (978) 371-7121. Companies can also contact their State Department of Agriculture.

Target Market: Germany/Europe

Perhaps the leading European trade show for organic food and non-food products. The Organic Trade Association is participating in the U.S. Pavilion at this show. ATO-Hamburg plans to staff an information stand in the U.S. Pavilion. This is a USDA-endorsed show.

Pro Wein 2001

Duesseldorf, Germany, March 4-6, 2001 (Interval: yearly)

U.S. Pavilion Organizers: California Wine Institute's office in the Netherlands, Tel: (31-172) 47 15 71; Fax: (31-172) 47 55 45 and Messe Duesseldorf North America, Tel: (312) 781-5180; Fax: (312) 781-5188; <http://www.messe-duesseldorf.de>

Target Market: Germany/Europe

Leading German trade show for wine and other alcoholic beverages. ATO-Hamburg staff will attend the show.

Internorga 2001

Hamburg, Germany, March 9 - 14, 2001 (Interval: yearly)

Show Organizer: (49-40) 35 69 0; Fax: (49-40) 36 69 21 80.

Target Market: Northern Germany

Show for the hotel, restaurant, catering, baking and confectionery trades

interzum 2001

Cologne, Germany, May 18-22, 2001 (Interval: 2 years)

U.S. Pavilion Organizer: Cologne International Trade Fairs, New York, Tel: (212) 974-8837; Fax: (212) 974-8838;.

Target Market: Europe/International

Major international trade show for furniture production and wood interiors. Show normally includes several U.S. Pavilions.

ANUGA 2001

Cologne, Germany, October 13-17, 2001 (Interval: 2 years)

U.S. Pavilion Organizer: B-FOR International, Tel: (540) 373-9935; Fax: (540) 372-1414.

Information on ANUGA can be viewed at <http://www.koelnmesse.de/anuga>

Target Market: Europe/International

One of the leading international trade shows for food and beverages and the premier show of its kind held in Germany. There is traditionally a large U.S. Pavilion(s) at this show; about 150-200 U.S. companies and associations normally exhibit in the U.S. Pavilion(s). This is a USDA-endorsed show.

Note: More information about these and other German exhibitions and trade shows can be found under the following Internet address: www.auma.de

Other Promotion/Activities:

Directory of American Foods in Europe On-Line/CD-ROM

The ATO-Hamburg, together with other FAS offices in Europe, has updated the American Foods in Europe Directory (AFE), a Guide to European Importers of U.S. Food and Beverage Products. This edition of the AFE contains listings of 300 European companies that import/distribute over 600 different U.S. food and beverage products in Europe. Great resource for European supermarkets and restaurants. Importers and distributors of U.S. products can register on-line. Take a look at the on-line version under <http://www.american-foods.org>

If you would like more details about the directory, or would like to receive a copy of the CD-ROM version, please contact the ATO-Hamburg.